Program Review SharePoint Site Submitter Training

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Prior to Accessing the Program Review SharePoint Site
In order for you to be granted access to the Program Review SharePoint Site, you must (in order):

1. Be registered with PA Login ([PA Login Registration](#)).
2. Provide the email address and username you used to register with PA Login to your PDE Program Review representative.
3. The representative grants you access to the Program Review SharePoint site and notifies you that you’ve been granted access.

**Note:** Just because you have access to one PDE SharePoint site doesn’t mean you have access to the Program Review SharePoint site. You will have access to the Program Review SharePoint site only after you’ve registered with PA Login AND you’ve been granted access by a Program Review representative.

Accessing the Program Review SharePoint Site
After you’ve been notified that you’ve been granted access, **using Internet Explorer (Version 7 or higher) on a Windows machine connected directly to the internet**, follow the instructions below to access the Program Review SharePoint site:

**IMPORTANT:** You may experience issues when using SharePoint through other browsers (such as Chrome, Firefox, or Safari) or on other operating systems (such as MAC/Apple). You will also likely experience issues when connected wirelessly to the internet.

**IMPORTANT:** Using Microsoft Edge requires that you add the Program Review SharePoint site ([https://collab.pde.pa.gov/OPHE/MajorReview](https://collab.pde.pa.gov/OPHE/MajorReview)) to your browser’s compatibility view settings.
1. Click on SharePoint Major Review Submitters' Site Page.

2. On the Commonwealth of Pennsylvania page, click Login to USER and MUSER click here.
3. In **Username**, enter “user\your PA Login username.” Note the following:

- Your **PA Login username** is the username you entered when you registered with PA Login. Your PA Login username is NOT your PA Login email address. If you can’t remember your PA Login username, visit [PA Login User Name or Forgot Password](#).
- Make sure you provided your PDE program representative your email address associated with the username you are entering (to verify, you can visit [PA Login Registration](#)).
- DO NOT enter the quotes; enter the information inside the quotes.
- You MUST enter “user\” before your PA Login username (No quotes).
- Your MUST enter a backslash (\) NOT forward slash (/) after “user” (no quotes) and before your PA Login username.
- Do NOT enter ANY spaces before or after “user”, the backslash (\), or your PA Login username.
- Do NOT capitalize “user” (no quotes).

For example, if my PA Login username is “mytestmachine”, I would enter the following in the Username: “user\mytestmachine” (no quotes).

4. In **Password**, enter your **PA Login password**.

   **Note:** If you forgot your password, visit [PA Login Forgot Password](#). If you change your password, you will not be able to access the Program Review SharePoint Site with the new password until the following day.
5. Click **Sign In**. The *Program Review Application Submission Home* page appears.

6. The *Program Review Application Submission Home* page displays instructions for submitting an application, as well as a list of the applications that you’ve submitted.

7. Do one of the following:
   a. To complete a new application, see *Completing a New Program Review Application*.
   b. To submit a new application, see
c. **Submitting a New Program Review Application.**

d. **To resubmit an application, see Resubmitting an Application.**

**Completing a New Program Review Application**

Major Review applications must be created using the Major Review application template associated with the year in which the program is going to operate. Initial Review applications must be created using the Initial Review application template associated with the year in which the program is going to operate. The templates are available through the Program Review SharePoint site.

1. In the Program Review SharePoint site, click on the **Templates** tab.

2. In the **Templates** table, click on the name of the appropriate template. The template opens in Microsoft Excel.

3. In Excel, choose **File > Save As**.

4. In Excel, choose **File > Save As**.
4. In the Save as dialog that appears, do the following:
   a. Click on your Documents folder.  
      **Note:** Saving the application to the directory that appears by default (The Program Review Templates Library) will result in an error. You do not have permission to save files in that directory.
   b. For **Save as type**, choose Excel Workbook (xlsx).  
      **Note:** Saving the application as any other file type, including the default Excel Template (xlt) or Excel 97-2003 (xls), will result in issues later in the process.
   c. In **File name**, consider entering a name to represent the program for which you’re completing the application.  
      **Note:** The filename of your application will be automatically replaced once you submit your application in SharePoint, so no need to spend too much time on naming conventions. However, **DO NOT use any special characters in the filename.**
5. Click **Save**.
6. After you’ve saved the application on your computer, complete the application with the following requirements:
   - Do not save the application on a Macintosh computer, or attach a file to the application that was created using a Macintosh computer.
   - Inserted PDF objects should be created with Adobe software. Documents saved by other software products in a PDF format do not always process properly.
   - Do not save the application as any other file format than Excel Workbook (xlsx).
7. After you've completed the application, visit the Application Submission ([SharePoint Major Review External Reviewers Site Pages](#)) page and follow the instructions to submit your application.
Submitting a New Program Review Application

After your Program Review application (Major Review or Initial Review) is complete and ready to be reviewed by PDE, you'll need to upload the application to the Program Review SharePoint site.

1. Click on SharePoint Major Review External Reviewers Site Pages.

2. On the Commonwealth of Pennsylvania page, click Login to USER and MUSER click here.
3. In **Username**, enter “user\your PA Login username.” Note the following:

- Your **PA Login username** is the username you entered when you registered with PA Login. Your PA Login username is NOT your PA Login email address. If you can’t remember your PA Login username, visit [PA Login Forgot Password](#).
- Make sure you provided your PDE program representative your email address associated with the username you are entering (to verify, you can visit [PA Login Forgot Password](#)).
- DO NOT enter the quotes; enter the information inside the quotes.
- You MUST enter “user\” before your PA Login username (No quotes).
- Your MUST enter a backslash (\) NOT forward slash (/) after “user” (no quotes) and before your PA Login username.
- Do NOT enter ANY spaces before or after “user”, the backslash (\), or your PA Login username.
- Do NOT capitalize “user” (no quotes).

For example, if my PA Login username is “mytestmachine”, I would enter the following in the Username: “user\mytestmachine” (no quotes).

4. In **Password**, enter your **PA Login password**.

**Note:** If you forgot your password, visit [PA Login Forgot Password](#). If you change your password, you will not be able to access the Program Review SharePoint Site with the new password until the following day.

5. Click **Sign In**.

![Add a document dialog](image)

7. In the Upload Document dialog, click Browse to search for and select your completed application.

**IMPORTANT:** The completed application must be an Excel Workbook (xlsx).

8. Ensure that Add as a new version to existing files is selected.

**IMPORTANT:** If you do not have Add as new version to existing files selected, the potential for duplicate applications in the system increases, which then increases the application processing time for your applications.

9. Do not enter any comments in Version Comments, as comments entered will not be reviewed.

10. Click OK. The Document Upload form appears.

**IMPORTANT:** It may take a few moments for the form to appear. You MUST complete the Document Upload form. **DO NOT** click Cancel. **DO NOT** Close. Otherwise, your application will be in an erroneous state and will not be processed promptly.
11. In the Document Upload form, enter the required information:
**IMPORTANT:** You must complete the Document Upload form. DO NOT click Cancel. DO NOT Close. Otherwise, your application will be in an erroneous state and will not be processed promptly.

a) For Name, do nothing.

**IMPORTANT:** The filename of your application will be automatically replaced once you submit your application. However, make sure there are no special characters in the filename. Otherwise, your application will be in an erroneous state and will not be processed promptly.

b) For Program Review Type, choose whether you uploading an application for Major Review or Initial Review.

c) For Program Provider, choose your program provider.

d) For Program, choose the program.

e) For Program Level, choose the program level.

f) For Program Credential, choose the program credential.

g) In Contact Name, enter the name of the primary program provider contact for the application.

h) In Contact Email, enter the email address of the primary program provider contact for the application.

i) In Contact Phone, enter the phone number of the primary program provider contact for the application.

12. Click Save. Your application is listed as Submitted in the Applications table. You will see your application listed in the Applications table until PDE starts reviewing the application. However, you are not able to edit or replace your application unless PDE returns the application to you for changes.

**Note:** You may need to refresh your browser to see application status changes.

When PDE is reviewing your application, you will not be able to see your application in the Applications table. After PDE finishes reviewing the application, one of the following will occur:

- **The application is returned to you for changes** - When an application is returned, you will be notified via email and your application is listed as Returned in the Applications table. You'll need to edit and then resubmit your application. See Resubmitting an Application.

- **The application is approved.** When an application is approved, you will be notified via email and your application is listed as Approved in the Applications table.
**Resubmitting an Application**

When you are notified by PDE via email that your application has been returned, your application is listed as *Returned* in the Applications table. You’ll need to download, edit, and then resubmit your application in the Program Review SharePoint Site.

**Downloading and Editing an Application**

1. Click on [SharePoint Major Review External Reviewers Site Pages](#).

2. On the *Commonwealth of Pennsylvania* page, click Login to USER and MUSER click here.
3. In **Username**, enter “user\your PA Login username.” Note the following:

- Your **PA Login username** is the username you entered when you registered with PA Login. Your PA Login username is NOT your PA Login email address. If you can’t remember your PA Login username, visit [PA Login Forgot Password](#).
- Make sure you provided your PDE program representative your email address associated with the username you are entering (to verify, you can visit [PA Login Forgot Password](#)).
- DO NOT enter the quotes; enter the information inside the quotes.
- You MUST enter “user\” before your PA Login username (No quotes).
- Your MUST enter a backslash (\) NOT forward slash (/) after “user” (no quotes) and before your PA Login username.
- Do NOT enter ANY spaces before or after “user”, the backslash (\), or your PA Login username.
- Do NOT capitalize “user” (no quotes).

For example, if my PA Login username is “mytestmachine”, I would enter the following in the Username: “user\mytestmachine” (no quotes).

4. In **Password**, enter **your PA Login password**.

**Note:** If you forgot your password, visit [PA Login Forgot Password](#). If you change your password, you will not be able to access the Program Review SharePoint site with the new password until the following day.

5. **Click** **Sign In**.

![Applications](image)

6. **On the Program Review Application Submission Home page**, in the **Applications** table next to the name of the application you need edit, click on the drop-down menu and then choose **Check Out**.
**IMPORTANT:** The application status **MUST** be Returned and the application **MUST** be checked out to you in order for you to resubmit your application.

**Note:** Depending on the browser you’re using, a small dialog box may appear asking whether you want to use "my local drafts folder." Ensure that option is **NOT** selected and then click OK.

7. Next to the name of the application you need edit, click on the drop-down menu and then choose **Download a Copy.** A download ribbon appears at the bottom of your screen asking whether you want to save the application.

**IMPORTANT:** DO NOT rename the application and DO NOT change the file type. Saving the application with any other application name will result in issues. Saving the application as any other file type, including the default Excel Template (xltx) or Excel 97-2003 (xls), will result in issues.

**IMPORTANT:** The following screenshots were taken using Internet Explorer. The download appearance and behavior may differ slightly in other browsers. Be sure to choose to save the application as opposed to open the application.

8. Click **Save.** The application is saved in your **Downloads** folder on your computer.
9. Edit the application as necessary in Microsoft Excel with the following requirements:
   - Do not save the application on a Macintosh computer, or attach a file to the application that was created using a Macintosh computer.
   - Inserted PDF objects should be created with Adobe software. Documents saved by other software products in a PDF format do not always process properly.
   - Do not save the application as any other file format than Excel Workbook (xlsx).

Resubmitting an Application

10. After you finish editing your application and are ready for PDE to review the application, Click on SharePoint Major Review External Reviewers Site Pages.

11. On the Commonwealth of Pennsylvania page, click Login to USER and MUSER click here.
12. In **Username**, enter “user\*your PA Login username.” Note the following:

- DO NOT enter the quotes; enter the information inside the quotes.
- You MUST enter “user\*” before your PA Login username (No quotes).
- Your MUST enter a backslash (\*) NOT forward slash (/) after “user” (no quotes) and before your PA Login username.
- Your PA Login username is NOT your PA Login email address (If you can’t remember your PA Login username, visit [PA Login Forgot Password](#)).
- Make sure you provided your PDE program representative your email address associated with the username you are entering (to verify, visit [PA Login Forgot Password](#)).
- Do NOT enter ANY spaces before or after “user”, the backslash (\*), or your PA Login username.
- Do NOT capitalize “user” (no quotes).

For example, if my PA Login username is “mytestmachine”, I would enter the following in the Username: “user\*mytestmachine” (no quotes).

13. In **Password**, enter your **PA Login password**.

**Note:** If you forgot your password, visit [PA Login Forgot Password](#). If you change your password, you will not be able to access the Program Review SharePoint site with the new password until the following day.
14. Click **Sign In**.

15. On the *Program Review Application Submission Home* page, click **Add document**.

16. In the *Upload Document* dialog, click **Browse** to search for and select your completed application.

**IMPORTANT:** The completed application must be an Excel Workbook (xlsx).

17. Ensure that **Add as a new version to existing files** is selected.
IMPORTANT: If you do not have Add as new version to existing files selected, the potential for duplicate applications in the system increases, which then increases the application processing time for your applications.

18. Do not enter any comments in Version Comments, as comments entered will not be reviewed.
19. Click OK. The Document Upload form appears.

IMPORTANT: It may take a few moments for the form to appear. You MUST complete the Document Upload form. DO NOT click Cancel. DO NOT Close. Otherwise, your application will be in an erroneous state and will not be processed promptly.
20. In the Document Upload form, review and/or edit the required information as necessary.

**IMPORTANT:** Be sure that the program information (Program, Program Level, Program Credential, Program Provider, and Program Review Type) is **EXACTLY** the same as what was entered before. If necessary, compare the program information in the Document Upload form with the information displayed in the Applications table. Depending on the browser or version of Excel you're using, you may need to enter all of the information in the Document Upload form again.
a) For **Name**, ensure that your application has not been renamed.

**IMPORTANT:** In order for your application to be properly resubmitted, the application name must be EXACTLY the same as it appears in the Program Review SharePoint site. Otherwise, your application will be in an erroneous state and will not be processed promptly.

b) For **Program Review Type**, choose whether you uploading an application for Major Review or Initial Review.

c) For **Program Provider**, choose your program provider.

d) For **Program**, choose the program.

e) For **Program Level**, choose the program level.

f) For **Program Credential**, choose the program credential.

g) In **Contact Name**, enter the name of the primary program provider contact for the application.

h) In **Contact Email**, enter the email address of the primary program provider contact for the application.

i) In **Contact Phone**, enter the phone number of the primary program provider contact for the application.

21. Click **Save**. Your application is listed as **Assessment Response** in the Applications table. You will see your application listed in the Applications table until PDE starts reviewing the application. However, you are not able to edit or replace your application unless PDE returns the application to you for changes.

**Note:** You may need to refresh your browser to see application status changes.

When PDE is reviewing your application, you will not be able to see your application in the **Applications** table. After PDE finishes reviewing the application, one of the following will occur:

- **The application is returned to you for changes** - When an application is returned, you will be notified via email and your application is listed as **Returned** in the Applications table. You'll need to edit and then resubmit your application. See **Resubmitting an Application**.

- **The application is approved** - When an application is approved, you will be notified via email and your application is listed as **Approved** in the Applications table.